



Llywodraeth Cymru  
Welsh Government



# Renewable Energy Sector Deal for **Wales**

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# Foreword

Wales is entering a defining period in its transition to clean, secure and affordable energy. Meeting our 2035 target to generate the equivalent of 100% of annual electricity consumption from renewable sources requires renewed urgency. A Sector Deal is needed now to translate ambition into coordinated action.

There are strong examples of what long term commitment and collaboration can achieve. The Morlais project on Anglesey demonstrates how sustained partnership can unlock Wales's natural marine energy resources and convert them into lasting economic opportunity for local communities and businesses. More broadly, the recent Contracts for Difference round secured support for more than 1,400 MW of renewable generation in Wales. This confirms that Wales is well placed to deliver the scale of change needed and that renewable energy provides an opportunity to benefit our economy, environment and energy security.

To meet our national targets, Wales requires a coordinated, whole system and multi technology partnership that brings together all renewable sectors, including onshore and offshore wind, solar, marine and hydro, alongside the enabling infrastructure and system flexibility needed to support them. In developing this Sector Deal, we acknowledge the recommendations of the National Infrastructure Commission for Wales and the UK Government's Local Power Plan, both of which align with and support our fundamental principle that Welsh communities should directly benefit from the development, ownership and long term value of renewable energy projects.

The purpose of the Sector Deal is to provide a clear and practical framework that accelerates renewable energy deployment while ensuring that economic, social, environmental and community benefits are retained in Wales. Its delivery will be guided by the Well being of Future Generations (Wales) Act 2015, applying its five ways of working by planning for the long term, preventing future problems, integrating objectives, collaborating across sectors, and involving people and communities in shaping Wales's energy future.

The Sector Deal is structured around seven themes and 78 commitments, with collaboration between government and the industry sectors central to its success. Governance and implementation arrangements will ensure oversight, accountability and coordination, supported by transparent monitoring of progress and clear mechanisms to address delivery challenges as they arise. To support planning and provide confidence to investors, the Sector Deal sets out clear short, medium and long term delivery horizons. It is intended to be implemented over four years and across political cycles. While all commitments will ultimately be subject to the priorities of the incoming administration, this work is intended to provide a strong and well evidenced foundation for the next Welsh Government.

Overall, this Sector Deal represents a collective commitment to accelerate renewable deployment, strengthen Welsh supply chains, build the workforce of the future and ensure that communities across Wales share in the benefits of the transition to a cleaner, fairer and more resilient energy system. Welsh Ministers are grateful to the Sector Leads and the Task and Finish Group members who have contributed to the development of the Sector Deal and reached majority agreement on its contents. Their collective expertise and collaboration have been invaluable.

*Rebecca Evans.*

**Rebecca Evans MS**  
Cabinet Secretary for  
Economy, Energy and Planning



# 1. Progress to date: what has already been done in Wales

Wales has set out an ambitious pathway for its energy transition which includes:

- The commitment to meet the equivalent of 100% of Wales's annual electricity consumption from renewable sources by 2035
- The commitment to deliver at least 1.5 gigawatts of locally owned renewable energy capacity by 2035
- The ambition to achieve a carbon-neutral public sector by 2030.

Welsh renewable electricity generation is equivalent to 53% of Wales' current electricity consumption and to 27% of Wales's estimated 2035 electricity demand. As the decarbonisation of transport and heating accelerates and demand for electricity rises through Investment Zones and new Artificial Intelligence Growth Zones, Wales will require an even larger and more diverse renewable energy fleet, supported by the grid infrastructure needed to transmit and distribute electricity to where it is required. Achieving the ambition to meet the equivalent of 100% of electricity consumption by 2035 will depend on how quickly new projects can secure consent, connect to the grid, mobilise supply chains and recruit the skilled workforce needed to deliver and operate them. The system must expand in a coordinated way to maximise benefits and ensure that communities across Wales see clear value from hosting renewable infrastructure.



Wales has already taken significant steps across government, industry, academia and the wider delivery system to prepare for this increase in demand. The Infrastructure Wales Act 2024 was introduced with the intention of creating a one-stop-shop consenting route for major infrastructure projects. Natural Resources Wales (NRW) has started to strengthen its advisory and casework capacity, including in environmental impact assessments, Habitats Regulations Assessments and marine licensing, and consenting bodies are making improved use of environmental data through Data Map Wales and other tools that simplify access to evidence. It is recognised that capacity pressures remain in parts of the system, including within advisory functions such as the advice services that support consenting processes. Commitments have been made within this Sector Deal to monitor these resource pressures and ensure that capacity remains sufficient as the development pipeline grows.

Strategic planning for the electricity system in Wales is progressing and is already informing decision making. Welsh Government is working with the National Energy System Operator (NESO) on the Strategic Spatial Energy Plan (SSEP) for Great Britain and contributing to both the Centralised Strategic Network Plan (CSNP) and the transitional Regional Energy Strategic Plan (tRESP), ensuring that network investment and renewable generation will in future be planned in a coordinated way that reflects current and future system needs.

The Welsh Government has raised concerns about the timing gap between near term grid connection decisions and longer term spatial planning, highlighting the need for stronger alignment between immediate investment decisions and the emerging strategic energy planning framework. Stakeholders also remain concerned that prolonged delays to strategic transmission network upgrades in Wales could significantly constrain the development pipeline in the medium term, and that efforts to accelerate the Mid Wales transmission upgrade should therefore be increased.

The Welsh Government also convened an Independent Advisory Group on the Future Electricity Grid for Wales to build an understanding of the possible approaches to delivering electricity infrastructure, develop a public evidence base and establish a set of agreed principles for identifying the most appropriate solutions for Wales. The Group's report was published on 21 January 2026. The Welsh Government is now in the process of responding to the recommendations.

Support for investment and economic development is well established. The Development Bank of Wales, Business Wales and the Freeports and Investment Zones programmes are enabling developers and communities to shape viable projects, enhance local participation and unlock the finance required to bring schemes forward. Skills development has advanced through the Net Zero Skills programme, the Regional Skills Partnerships and reforms introduced by the Commission for Tertiary Education and Research (MEDR). Industry and education collaborations, such as Destination Renewables, further demonstrate how training provision can be aligned with real workforce opportunities. However, it is recognised that greater coordination across sectors and technologies would be beneficial.

Wales also benefits from an established framework for community involvement in renewable energy. Community Energy Wales, the Welsh Government Energy Service and Ynni Cymru provide expertise and hands-on support for community groups seeking to develop or invest in local projects, while the regional energy teams the Welsh Government funds in each region help connect these ambitions to wider system planning.

The renewable energy sector itself forms an integral pillar of Wales's recent successes, having made good progress over the last decade by bringing forward wind, solar and tidal projects despite operating in a challenging policy and market environment. The Energy Generation in Wales reports, published annually, sets out Wales's energy generation capacity at the end of each calendar year and analyse how this has changed over time.

Together, the foundations outlined above provide a strong platform for the Sector Deal to operate effectively and deliver long-term impact. However, even with more than 1,400 MW of new Welsh renewable energy projects securing support in the recent Contracts for Difference (CfD) round, the pace of deployment required to meet Wales's 2035 electricity needs remains significant. The Sector Deal therefore offers a collective mechanism to tackle barriers, align decision-making and accelerate deployment across all renewable technologies. It provides a practical route for stakeholders to move forward more quickly, with greater clarity and confidence, ensuring that the climate and nature emergencies are addressed in a way that maximises the benefits for Wales. It is also intended to provide a stable basis on which any future government can consider policy changes needed to support its priorities.

As identified, this document will provide the evidence base for a future Welsh Government to determine its priorities. It sets out commitments that would enable the renewable energy industry to contribute effectively to meeting statutory decarbonisation targets and growing the Welsh economy.

## 2. Introduction and purpose of the Sector Deal

RenewableUK Cymru, together with Solar Energy UK and Marine Energy Wales, published *Unleashing the Full Value of Welsh Renewables (2025)*<sup>1</sup>, which sets out industry views on the scale of the economic opportunity available to Wales if current energy targets are exceeded over the coming decade. The report estimates that accelerating renewable energy deployment, within the current policy environment, could potentially unlock up to £46.9 billion in private investment and generate more than £10 billion in direct economic value for Welsh businesses. It also highlights that faster progress in wind, solar and tidal projects would help secure affordable, homegrown power while reducing the exposure of Welsh households and businesses to volatile global energy markets.

Building on this, *Cymru Clean Power: Call for Government 2026*<sup>2</sup> (published by RenewableUK Cymru) identifies that Wales's renewable energy industry is positioned to support more than 8,000 secure, high-quality jobs. There are also publications from the Institute of Welsh Affairs, along with perspectives from the community energy sector, highlighting further opportunities for increased community ownership and the wider benefits this can deliver.

The Sector Deal presents a set of commitments and actions agreed between the Welsh Government and the renewable energy sector in Wales, spanning solar PV, onshore and offshore wind, floating wind, marine and tidal technologies, as well as hydropower and pumped storage, reflecting the full range of renewable technologies across the sector as well as community energy representation. It delivers a shared ambition to maximise the benefits of renewable energy for Wales and its communities and to power future economic growth. Bringing partners together across seven themes, the Sector Deal sets out how they will work collectively to strengthen the enabling environment, mobilise investment, build skills, deliver grid infrastructure, support innovation and ensure that communities benefit directly from the changes ahead. In doing so, it will contribute to addressing the climate, environmental and cost of energy crises facing Wales.

Together with the Offshore Wind Task and Finish Group Action Plan: 2025 to 2026, this provides clarity on the actions that must be implemented to place us in a stronger position to meet our energy targets.

The Sector Deal complements mechanisms that operate at the United Kingdom (UK) level, including energy policy, revenue support for low carbon generation, transmission charging and aspects of system planning. The Welsh Government will focus on devolved levers such as planning, consenting, skills, regional economic development, innovation and community benefit. It will also coordinate representation with the UK Government and its relevant departments, such as the Department for Energy Security and Net Zero (DESNZ), The Crown Estate, the National Energy System Operator (NESO) and the Office of Gas and Electricity Markets (Ofgem), where Welsh interests need to be reflected. This includes matters relation to CfDs, the Clean Industry Bonus (CIB) and Transmission Network Use of System (TNUoS) charging.

The sector has also highlighted the need for Welsh Government to prioritise network development and to clarify how it will work with UK Government and stakeholders such as Ofgem, NESO, NGET, Distribution Network Operator's (DNOs)/ Independent Distribution Network Operator (IDNOs) and affected communities as part of the Sector Deal.

The Welsh Government has committed to advocate for community energy considerations to be reflected in future network grid connections. Welsh Government coordination will also extend to engagement with strategic partners such as the British Business Bank, Development Bank of Wales, Great British Energy (GBE) and the National Wealth Fund (NWF) to ensure that Welsh projects can access emerging delivery streams and investment opportunities.

<sup>1</sup> [2329-renewable-energy-in-wales-report.pdf](#)

<sup>2</sup> [Cymru clean power: Call for Government 2026](#)

### 3. Stakeholder leads

The Sector Deal has been shaped by extensive input from organisations across Wales. Those selected were chosen because they are currently among the most active in delivering renewable energy deployment. Membership included developers, technology leads and representatives from relevant trade associations, with each asked to consider both their own technology interests and the wider needs of the renewable energy system in Wales. They engaged with colleagues across their industries and reported back to the Group, while recognising that they represented a cross section of the sector rather than all participants. Under the Terms of Reference (see Appendix 1, which also includes a membership list), the Group's overarching aim was to advise the Cabinet Secretary for Economy, Energy and Planning on commitments that would sustain a positive environment for renewable energy development in Wales while safeguarding the natural environment and supporting community interests.

The Group's role was to provide an honest, evidence based assessment of renewable energy deliverability across technologies, identify priority areas that could unlock economic and social value, and develop clear commitments with actions, timescales and owners for inclusion in the Sector Deal. In shaping these commitments, the Group considered recent actions and investments to ensure remaining barriers were addressed and to avoid duplicating activity already underway in Wales or at a UK level. The process drew on work undertaken by the Offshore Wind Task and Finish Group, the UK Government's Solar Roadmap and Onshore Wind Strategy, and the UK Marine Taskforce.

The Group also reflected the needs of developers, particularly in relation to project and grid consenting, supply chains and skills, to ensure the final content of the Sector Deal was grounded in practical delivery realities. Whilst it was not possible to involve all stakeholders in the development of the Sector Deal, the intention is that the whole sector can engage as implementation proceeds, with Sector Leads and industry trade bodies acting as conduits to gather and feed wider input into the Sector Deal.



## 4. Structure of the Sector Deal

The Welsh Government is strongly committed to developing renewable and low-carbon energy across all technologies and at all scales to meet Wales's future energy needs. The Sector Deal is organised around seven themes that reflect the areas where coordinated action is most essential:

1. the enabling environment;
2. market and investment conditions;
3. skills and the workforce;
4. the grid in Wales;
5. innovation and research;
6. infrastructure and supply chains; and
7. community ownership and benefits.

These themes were developed with the Well-being of Future Generations (Wales) Act 2015 in mind, as shown in the table below, which sets out the corresponding well-being goals against each theme. As this is not a policy document, a full impact assessment has not been undertaken, although the integrated impact assessment has informed the development of this Sector Deal. The themes are also aligned with the Offshore Wind Task and Finish Group Action Plan.

The Sector Deal must deliver against the well being goals and the five ways of working, which are long term thinking, prevention, integration, collaboration and involvement. The Sector Deal has the potential to be transformative across these goals by realising the socio economic and environmental opportunities that renewable energy deployment can offer. These include reducing greenhouse gas emissions, creating jobs and training opportunities, delivering social value and regeneration through contracts, reducing fuel poverty, strengthening community cohesion and supporting healthy ecosystems.

Theme	Potential Contribution to Wales' Well-being Goals
1. Enabling Environment (Policy/Regulation)	A Prosperous Wales; A Resilient Wales; A Globally Responsible Wales; A Wales of Cohesive Communities
2. Market Making (Investment/Funding)	A Prosperous Wales; A Globally Responsible Wales
3. Skills & Workforce	A Prosperous Wales; A Resilient Wales; A Healthier Wales; A More Equal Wales; A Globally Responsible Wales; A Wales of Vibrant Culture & Thriving Welsh Language
4. Grid in Wales	A Prosperous Wales; A Resilient Wales; A More Equal Wales; A Healthier Wales; A Wales of Cohesive Communities
5. Innovation & Research	A Prosperous Wales; A Resilient Wales; A Healthier Wales; A Globally Responsible Wales
6. Infrastructure & Supply Chains	A Prosperous Wales; A Resilient Wales; A Globally Responsible Wales; A Wales of Cohesive Communities
7 Community Ownership & Benefits	A Wales of Cohesive Communities; A Prosperous Wales; A Resilient Wales; A Healthier Wales; A More Equal Wales; A Wales of Vibrant Culture & Thriving Welsh Language

The Sector Deal applies across multiple renewable energy technologies in Wales, each with distinct near-term priorities. For example, onshore wind and solar developers have emphasised consenting processes and grid-connection timing, while marine, tidal and floating-offshore developers highlighted early-stage finance, skills and innovation as their most immediate needs. Stakeholders also noted that priorities shift by project stage, such as between pre-planning and post-consent.

Given this variation, a single fixed hierarchy of commitments would not reflect the differing needs of the wider sector. Subject to agreement by the future Government, the intention during the early implementation phase of the Sector Deal is that Sector Leads will develop a practical, technology-specific prioritisation matrix of commitments. This will be developed in collaboration with Task and Finish stakeholders to guide and sequence actions where they are considered to deliver the greatest value.

This matrix will apply common tests, which will be further refined by stakeholders during implementation, such as whether an action removes a critical-path blocker, reduces investment risk or is deliverable in the near term, ensuring effort is focused where it will have the greatest impact for each technology. It is recognised that, to support delivery of Wales's 2035 targets and the wider purpose of the Sector Deal, commitments relating to large-scale technologies capable of making the greatest near-term contribution to climate, environmental and cost-of-living objectives should be appropriately prioritised.

A formal change-control mechanism, proposed within the governance arrangements of this Sector Deal (see Section 9), will ensure the framework can adapt to evolving policy and market conditions.

Each theme presented below includes summary background paragraphs that outline what has already been achieved, the opportunities that exist and the additional value the Sector Deal will bring.

## 5. Cross cutting priorities

Cross-cutting issues were identified through the discussions. These apply across all themes and technologies and will underpin delivery through the Sector Deal. The discussions emphasised the following priorities:

### 5.1.1 Policy stability, consistent guidance and decision making

Participants highlighted the need for clear, practical and well-sequenced policy and guidance that is developed collaboratively and consulted on before publication. Such guidance supports high-quality applications and ensures proportionate and consistent assessment. Key areas identified by participants include clarity on environmental assessment requirements, the balance between biodiversity and net-gain objectives, net zero delivery, and clarification on how development should interact with peatland sites. It is recognised that clear policy, guidance and consistent, predictable decision-making are important to deliver investor certainty and secure commitment to projects.

As part of developing any new Welsh-specific guidance, stakeholders suggested that a competitiveness check should be applied to ensure that additional requirements do not unintentionally disadvantage Welsh projects in UK revenue support auctions or financing markets. A collaborative approach will be needed during the implementation of the Sector Deal to determine how this check is developed, assessed and applied.



### 5.1.2. A shared environmental evidence base and sufficient advisory capacity

Discussions stressed the importance of improving access to consistent, high-quality environmental evidence to reduce delays and uncertainty. Welsh Government and NRW will continue to strengthen evidence gathering and data availability, supplementing existing sources with data provided by the renewable energy industry. Where casework pressures require additional capacity, options for external advisory support will be considered under the Sector Deal (including support for Local Planning Authorities (LPAs) to ensure timely responses while maintaining regulatory independence.

Developers can already enter into agreements with local planning authorities, such as Planning Service Agreements (PSAs). For example, in North Wales developers have combined funding to support the regional planning service for significant energy projects. The key issue is not the mechanism itself but ensuring that LPAs have the resources to deliver the level of support that PSAs are intended to provide. Commitments to monitor and address capacity and resource challenges are included within the Sector Deal, and if these measures prove effective, they are likely to reduce the need for PSAs as implementation of the Sector Deal progresses.

### 5.1.3. Early engagement and application quality

Across the discussions, earlier and more consistent engagement between developers, consenting bodies and local communities was seen as essential to improving application quality and reducing avoidable delays. The Sector Deal will help standardise these practices. Aviation and radar safeguarding will also be strengthened through structured and transparent engagement routes with National Air Traffic Services (NATS) and the Civil Aviation Authority (CAA), enabling the early identification of any required mitigation.

### 5.1.4. Coherence between generation projects and the electricity grid

Participants emphasised the need for closer alignment between project pipelines and grid development. Through advocacy, the Sector Deal will help ensure connection queue decisions are aligned to the SSEP. The influence of TNUoS signals on project viability and location choices in Wales was also highlighted.

### 5.1.5. Coordinated positions on UK-level reforms

Discussions identified the importance of Welsh Government and industry coordinating their positions, insofar as possible, where UK-level reforms influence project viability in Wales, including Clean Power Action Plan 2030, SSEP, tRESP, CSNP, CfD, the CIB and TNUoS charging. The Sector Deal will also ensure that Welsh Government and industry work together to shape funding packages that attract private investment, including through engagement with GBE and the NWF.

### 5.1.6. Fair and flexible community benefit frameworks

There was broad recognition of the importance of community benefit arrangements that are fair, flexible and proportionate to local capacity and priorities. Community engagement will be embedded into the development of tools, guidance and good practice as the Sector Deal evolves.



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## 6. Commitment types in the Sector Deal

The Sector Deal builds on a landscape that is already changing. Its purpose is to bring structure and clarity to this transition by aligning Welsh specific levers with UK energy systems and ensuring that delivery happens effectively on the ground.

Delivery is organised through three distinct types of commitments:

- Welsh Government commitments set out the actions that the Welsh Government could take within devolved responsibilities, such as planning, consenting, skills and community benefit.
- Sector commitments describe the actions that developers, operators and supply chain companies will take to plan and deliver projects responsibly, to invest in skills and capability, to raise the quality of applications and to share pipeline information.

- Shared commitments specify where Welsh Government and the sector collaborate together, such as in the co development and consultation of guidance, the creation and use of a shared environmental evidence base and the joint representation of Welsh interests in United Kingdom processes, alongside maintaining a national register of projects detailing energy production and community benefit provision.

Where a sector is not specifically referenced in a commitment, this means the commitment applies to all sectors.

## 7. Timescales

The 78 commitments made under the seven themes are presented in Annex 1 of this document. Each commitment has clear owners, a defined timescale and will be reported through the Sector Deal's governance and implementation arrangements (see Section 9). Timescales have been assigned in line with the delivery horizons agreed with Sector Leads, with some actions beginning immediately and others continuing into the next Welsh Government. By setting out clear short-term, medium-term and longer-term delivery horizons, the Sector Deal seeks to provide certainty for investors, communities and delivery bodies across political cycles, supporting long-term planning and confidence. Short-term actions are intended to commence immediately and be completed within the first 6 to 12 months following implementation of the Sector Deal (unless specified as ongoing), medium-term actions within 12 to 24 months and longer-term actions within 24 months or longer.

During implementation, a prioritisation matrix for each technology, together with delivery plans, will set out milestones, responsible owners, dependencies, risks and KPIs. It is recognised that delivery will ultimately depend on the priorities of the next administration, and that commitments will therefore naturally be refined to be more specific and outcome focused through the Task and Finish Groups.

## 8. The themes

As outlined in Section 4, the differing short-term priorities across technologies and the way these priorities shift at different project stages mean that the themes presented below should not be interpreted as a hierarchy. Instead, they represent the set of themes developed through the initial Sector Deal discussions and provide the framework within which technology-specific prioritisation of commitments will take place.

### 8.1. Enabling environment, policy, regulation and consenting

#### 8.1.1. What is already being done

Wales has modernised its consenting and regulatory framework in recent years. The Infrastructure (Wales) Act 2024 has introduced an integrated consenting route for major infrastructure projects, strengthening both the efficiency and consistency of decision-making. NRW has expanded its capacity to manage environmental impact assessments and Habitats Regulations Assessments and has improved processes for marine licensing. Consenting bodies have also enhanced access to data through platforms such as Data Map Wales.

In parallel, work is underway to modernise planning guidance. In consultation with industry, Welsh Government has reviewed key areas including environmental impact assessment requirements, the balance between biodiversity and wider net zero objectives, and the treatment of peatland. Developers and consenting authorities are increasingly adopting earlier scoping discussions to improve application quality and minimise delays during determination.

Future Wales (The National Plan 2040) sought to provide a robust and supportive policy framework for onshore wind and other renewable energy projects that contribute to Wales's net zero targets. It identified a series of Pre-Assessed Areas (PAAs), based on technical work commissioned from Arup (Assessment of onshore wind and solar energy potential in Wales) for onshore wind turbines where the likely landscape impacts had already been modelled

and found to be capable of accommodating large-scale development, including turbines up to 250m to tip. Within these areas there is a presumption in favour of large-scale wind energy development, including repowering, subject to the decision-making framework set out in Policy 18. Outside these areas, a positive policy context still applies, again subject to Policy 18. The industry has raised concerns that these PAAs may have been undermined by subsequent updates to Planning Policy Wales.

Further clarity is expected in 2026. For example, Future Wales, including the policy framework around the PAAs, will undergo a statutory assessment to determine whether any elements require revision. This process may identify specific aspects of Future Wales that should be revisited, though it may equally conclude that no changes are necessary. Furthermore, The Infrastructure (Wales) Act 2024 reinforces Welsh Government's commitment to the efficient and effective determination of large-scale infrastructure applications by providing a modern consenting process capable of delivering timely consents. To ensure the system is ready from day one, funding was provided in 2025 to strengthen planning capacity within PEDW and NRW.

The system also enables a move towards full cost recovery, ensuring public-sector bodies are properly resourced to determine applications efficiently and effectively, with the aim of completing all determinations within, or ahead of, the 52-week statutory timeframe.

Welsh Government have also funded two new senior planner roles to support infrastructure projects through an expanded North Wales Shared Planning Service, recognising the benefits that regional collaboration can bring to resourcing complex applications. An outline proposal has also been received from Mid Wales, and further expressions of interest for joint working are welcomed.

Training is also under way for local authorities and statutory consultees on the new consenting system to ensure they are fully equipped to contribute effectively to the process.

### 8.1.2. Why this matters and what the Sector Deal adds

The enabling environment determines the pace at which renewable projects can be brought forward, and the commitments from the Sector Deal will aim to strengthen this by consolidating recent work and supporting the co-development of clear policy and guidance for the delivery of renewable energy. Guidance will clarify how development should interact with peatland. It will also help formalise early scoping practices, including structured and transparent engagement with National Air Traffic Services and the Civil Aviation Authority, and will promote better use of data so that applications are assessed consistently and proportionately.

The Sector Deal will create important opportunities to strengthen policy alignment across departments, giving investors greater clarity and confidence, and maintaining consistent interpretation of planning policies. It will embed a more strategic approach to consenting, particularly for offshore wind, where earlier engagement and clearer decision pathways will support timely progress. As developers now contribute additional fees for advisory input, it is essential that this delivers demonstrable improvements in timeliness and service quality. Commitments relating to monitoring and review aim to ensure the system remains efficient, proportionate and adequately resourced as deployment scales up.

In addition, the Sector Deal will enable collaboration on practical solutions to unlock onshore renewables deployment and support the transparent, streamlined delivery of environmental assessment workstreams. The Sector Deal will also encourage digital transformation and workforce planning across planning services to improve efficiency, capability and transparency.

## 8.2. Market making, investment and funding support

### 8.2.1. What is already being done

Wales has a range of initiatives that support the development of renewable projects, including the Development Bank of Wales, Business Wales, Freeports and Investment Zones, the Welsh Government Energy Service and Trydan Gwyrdd Cymru. These initiatives help shape viable projects and enable local firms and wider supply chains to participate effectively in delivery. Welsh Government and industry partners are also engaged in UK-level discussions on revenue support mechanisms such as CfDs and on supply chain incentives.

Economic development agencies in Wales continue to work with ports, manufacturers and service providers to prepare for future opportunities. This includes helping companies understand upcoming pipeline requirements and supporting feasibility work where appropriate.

### 8.2.2. Why this matters and what the Sector Deal adds

The Sector Deal provides an opportunity to undertake advocacy work aimed at improving pipeline visibility for a range of partners, including the Crown Estate, the Development Bank of Wales, GBE and the NWF. This will enable the Welsh Government to work with partners to shape technology-specific funding packages and to develop clear guidance on the public and private finance available for each technology. The proposed advocacy work will also strengthen the collective Welsh case for future CfD allocations, particularly for tidal stream, where this support has been specifically requested of Welsh Government. It is anticipated that Sector Deal commitments will support the expansion of community and local clean energy by helping to integrate proposed community energy financing and shared ownership models into wider investment strategies as envisaged in the UK Government's Local Power Plan.

## 8.3. Skills and the workforce

### 8.3.1. What is already being done

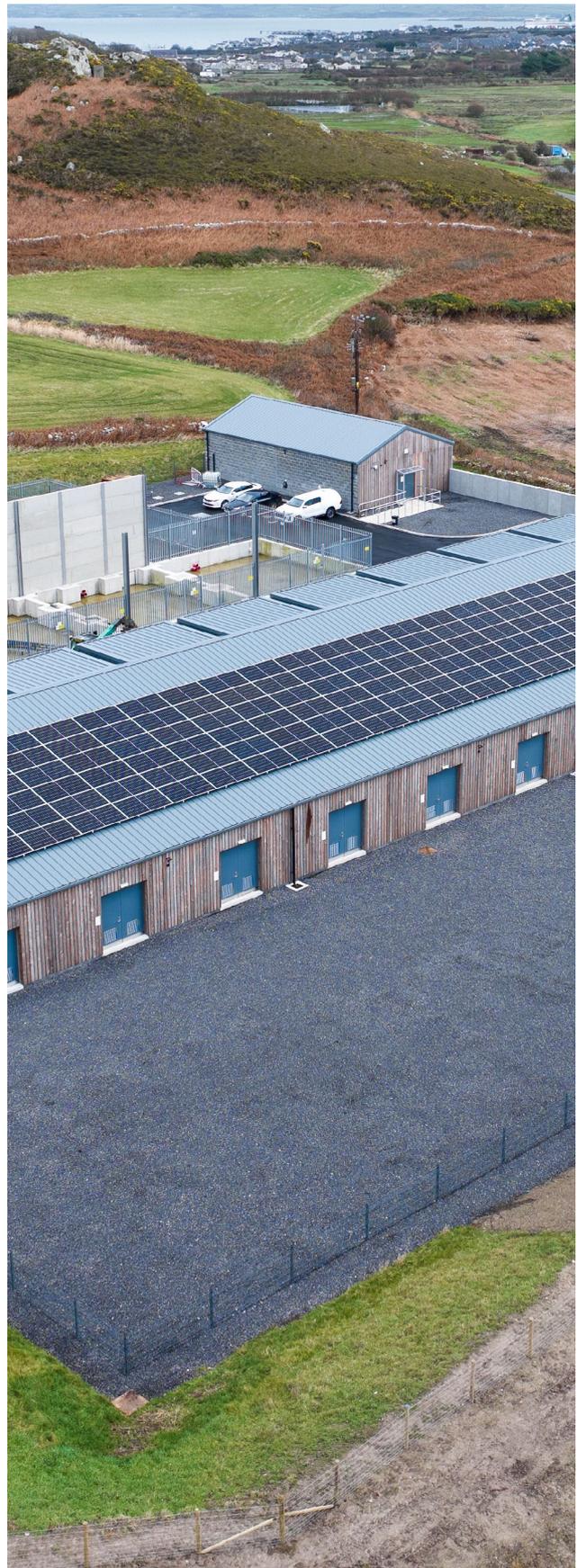
Skills development has been strengthened through the Net Zero Skills agenda, the Regional Skills Partnerships and work delivered by the Commission for Tertiary Education and Research. Partnerships between education providers and industry, such as Destination Renewables, have shown how curriculum design, learning facilities and employer placements can be aligned with anticipated workforce needs. Wales has also begun to improve labour market intelligence and expand awareness of renewable energy career pathways.

Welsh Government and its partners are additionally exploring options to build a stronger tutor pipeline in subjects where capacity is tight, including engineering and digital disciplines, and discussions are underway on creating a single platform that brings together training routes and vacancies.

### 8.3.2. Why this matters and what the Sector Deal adds

The scale of renewable deployment planned for Wales will require a larger and more adaptable workforce over the next decade. The Sector Deal will coordinate the national skills response by linking training provision to the renewable project pipeline and grid sequencing, supporting industry to articulate long-term workforce needs, and ensuring opportunities are accessible at all career stages. It will also promote consistent early engagement with schools and encourage the development of regional hubs aligned with the development pipeline and future workforce demand.

Through the Sector Deal, a ten to fifteen year workforce plan will be developed to align skills provision with deployment targets and improve coordination between Regional Skills Partnerships and Careers Wales to strengthen early Science, Technology, Engineering, and Mathematics (STEM) engagement. It will also create scope to establish a national tutor-pipeline strategy, develop an apprenticeship roadmap and bilingual training resources, inspire the next generation through school engagement and ambassador programmes, and support mid-career transitions into the renewable energy sector from other industries.



## 8.4. The grid in Wales

### 8.4.1. What is already being done

Wales is actively engaged in strategic system planning. Welsh Government has already undertaken energy planning at national (Future Wales), regional and local levels, to provide a detailed evidence base to support grid planning. Welsh Government and industry have participated in NESO's development of the SSEP commissioned by the UK, Welsh and Scottish Governments, and contributions have also been made to both the CSNP and tRESP, which will underpin future investment decisions. Advisory work on how new grid infrastructure in Wales should be delivered has reported and Welsh Government will shortly respond on action to deliver the recommendations.

A clearer policy position is also critical for the consenting and delivery of the grid infrastructure required to meet Wales's growing electricity demand and to enable the deployment of renewable energy generation needed to supply it.

### 8.4.2. Why this matters and what the Sector Deal adds

Network capacity, connection timing, and technically and commercially deliverable connection solutions are all decisive for the viability of renewable projects. The Sector Deal creates opportunities to provide input to NESO and Ofgem so that Welsh priorities are embedded in the SSEP and regional energy plans, and to work with NESO and distribution network operators to ensure that projects at distribution level are not subject to unnecessary delays. It also provides a platform to agree a Welsh grid-upgrade roadmap with clear capacity targets and timelines, offer greater clarity on consenting for grid infrastructure and coordinate advocacy for the proposed major north–south connection and wider resilience measures needed to future-proof the network.

The current Welsh Government will formally respond to the Independent Advisory Group report on the Future Electricity Grid for Wales, supporting the next Welsh Government in determining how to take forward the Group's findings and recommendations.

## 8.5. Innovation and research, including circular economy and decommissioning

### 8.5.1. What is already being done

Wales has a strong platform for innovation through Wales Innovates, which sets out national missions for research and development. Programmes such as SMART, the Circular Economy Fund and Knowledge Transfer Partnerships provide practical support for businesses and universities, and there is active research underway in areas including marine energy, digital grid technologies and materials circularity. Welsh organisations are also beginning to explore the decommissioning and repowering needs of future renewable assets, recognising the importance of innovation across the full lifecycle of technologies.

### 8.5.2. Why this matters and what the Sector Deal adds

Innovation reduces risk and cost, improves environmental performance and creates opportunities for Welsh supply chains. The Sector Deal will help align Welsh innovation strengths with wider UK research and innovation funding, promote the sharing of best practice on design for reuse, repowering and recycling, and support the development of credible decommissioning pathways that sustain public confidence. It will also establish a Welsh innovation roadmap that links research outputs to deployment needs and create a funding-coordination group to align Welsh and UK innovation streams.



## 8.6. Infrastructure and supply chains

### 8.6.1. What is already being done

Business Wales plays a central role in strengthening supply chains and facilitating collaboration between Welsh businesses and public sector purchasers. It provides tailored procurement advice, particularly to foundational economy firms, locally rooted businesses and clusters, helping them compete for public and private sector contracts.

Supply chain and tender support is delivered by a small national team consisting of a Supply Chain Engagement Manager, who leads national buyer engagement, Tier 1 contractor relationships and strategic pipeline development, and two Supply Chain Managers, who provide direct advisory support to SMEs and coordinate meet the buyer activity. This core team is supported by the wider Business Wales adviser network and specialist external partners with expertise in tender writing, procurement legislation and joint bidding.

Business Wales has also mapped renewable energy supply chains and assessed port capabilities relevant to deployment, operations and maintenance. Regional economic development teams and Business Wales are supporting companies to prepare for future opportunities by helping them understand procurement expectations, capability requirements and relevant standards. Early discussions are also underway on how procurement routes could be simplified.

Support for businesses includes guidance on pre-qualification, tender submissions, accreditation requirements and collaborative bidding. Business Wales works closely with buyers to deliver supplier briefings, joint bidding workshops and pre-market engagement sessions. Further assistance is provided through tendering advisers, how to tender workshops, meet the buyer events and engagement sessions, all designed to broaden supply chains and create new opportunities for Welsh suppliers.

### 8.6.2. Why this matters and what the Sector Deal adds

A resilient supply chain ensures that economic value is retained in Wales and that projects can be delivered efficiently. The Sector Deal will build on existing tools such as Sell2Wales to provide a clearer route for suppliers to access opportunities. It will encourage more coordinated market engagement so that suppliers are not required to attend multiple duplicate sessions, and it will link skills planning directly to supply chain needs so that training leads to real job outcomes.

## 8.7. Community ownership and benefits

### 8.7.1. What is already being done

Wales has a strong record of supporting community participation in renewable energy through Community Energy Wales, the Welsh Government Energy Service and, more recently, Ynni Cymru, with nearly 1 GW of capacity in local ownership. Many communities have already benefited from community benefit funds and local development support, provided by developers, along with proposed shared ownership opportunities. Welsh Government has also published local ownership guidance that encourages developers to bring forward meaningful proposals and ensure communities share in the value of projects. Local Area Energy Plans have now been developed across every local authority in Wales, providing detailed local pathways to net zero and offering each area clear information on energy system needs that can lead to priority projects.

The UK Government's Local Power Plan, published on 9 February 2026, sets out a national programme to expand local and community-owned clean energy through up to £1 billion of grants, loans, advice and hands-on expert support, delivered in partnership with GBE. Its purpose is to help communities and local authorities develop projects at scale and ensure that the economic and social benefits of clean energy are retained locally. It recognises that current market arrangements often favour larger projects and commits to supporting more than 1,000 local and community schemes by 2030.

### 8.7.2. Why this matters and what the Sector Deal adds

Community participation will be central to the long term success of renewable energy deployment in Wales. The accompanying Evidence Annex to the Local Power Plan identifies the key barriers and market failures constraining community and local energy, including access to funding and finance, challenges in securing grid connections, limited market access, the absence of scalable business models, and persistent capacity and capability gaps. Stakeholders for this theme have highlighted closely related issues across Wales.

Supporting the Welsh Government's 2020 Local Ownership of Energy Generation policy, the Local Power Plan highlights topic areas such as fairer community benefit arrangements and improving fair access to energy for communities, reinforcing many of the proposed commitments under Theme 7. Although the Plan does not mandate changes to grid ownership or reserve grid capacity for community projects, it explicitly acknowledges the challenges communities face in accessing the grid. In parallel, NESO and Ofgem are progressing connections reforms that move toward a "first ready, first needed" approach, creating a national policy environment in which Welsh Government can advocate for community considerations to be reflected in future queue management decisions.

Taken together, these developments mean that Theme 7 commitments will support Welsh Government policies as reflected in the Local Power Plan, which aims to gather evidence on how current market arrangements disadvantage communities across the UK, informing the case for future reforms, including potential price support mechanisms for community projects if required.

A key question for the Sector Deal is how Wales positions itself in response to the UK's Community Benefits and Shared Ownership for Low Carbon Energy Infrastructure consultation. The outcome of that consultation will establish a new UK wide baseline, and Wales will need to consider how this aligns with wider Welsh social value priorities and long-term local benefit. Under the Local Power Plan, the UK Government has already stated that it will develop detailed proposals for how a mandatory shared ownership offer could operate and will consult on these proposals in 2026. This will use the existing powers in the Infrastructure Act 2015. As part of the development of this Sector Deal, stakeholders have offered a range of views on community benefits for low-carbon energy infrastructure and on shared-ownership schemes, including:

- Mandatory community benefit levels and the method for determining them (e.g. per MW contribution or on an energy yield based approach).
- Independent governance structures for community benefit funds.
- Mechanisms (such as national/regional wealth funds) to reinvest a portion of project revenues for long-term local benefit. Ring-fencing a portion of project value to support community capacity-building and provide access to independent technical, legal and financial advice.
- Wider shared ownership targets, including the setting of separate targets for community and local ownership.

These contributions illustrate the diversity of issues stakeholders wish to see explored further. The Sector Deal therefore outlines opportunities for Welsh Government to collaborate with the renewable energy sector to develop further understanding of the range of models for local ownership, alongside options for benefit sharing and the integration of social value principles. This collaborative approach will help identify practical and deliverable arrangements that keep benefits in Wales and provide greater clarity for developers, communities and decision-makers.

Building on this, the Sector Deal facilitates the opportunity to update Local Ownership Guidance, develop a consistent framework for benefit sharing, and embed social value principles in partnership with the Future Generations Commissioner. It also highlights the need to improve transparency through a register of community benefits and coordinated communication tools, and to ensure that energy-affordability considerations are incorporated into the design of benefit packages.

Commitments developed for this theme are intended to position Wales as a community-centred deployer of renewable technologies, whilst recognising that any future approach must strike the right balance so that Welsh projects are not disadvantaged in competitive UK wide mechanisms such as future CfD rounds. Ensuring that expectations remain fair, proportionate and aligned with UK wide practice will be essential to maintaining both community support and project competitiveness.

As jobs and skills are also an important form of community benefit, there are clear cross-cutting links with the Skills and Workforce theme. Stakeholders with expertise in community ownership and benefits should therefore be represented in the relevant Task and Finish Groups to support joined-up delivery.



## 9. Governance and implementation arrangements

A set of governance and funding options have been developed to support delivery of the Sector Deal. These options are presented to allow flexibility for an incoming Welsh Government, recognising that decisions on resourcing, delivery responsibilities and the degree of public funding may vary depending on ministerial priorities under a new administration. The intent is to maintain momentum while providing options on how best to resource implementation thereafter. To protect the integrity of the planning and consenting system, governance arrangements will need to explicitly separate Sector Deal implementation work from statutory planning functions and decision making.

All options retain a consistent governance framework led by the Welsh Government–participated and chaired Sector Leads Group, supported by Task and Finish Groups established as required to progress commitments. Each option assumes a dedicated Programme Manager, appointed from an independent body, to coordinate delivery, maintain pace and ensure that commitments are implemented effectively. The primary difference between the options is how implementation, including the Programme Manager, is funded. It is likely that a minimum funding threshold will need to be established to secure the Programme Manager role and commission the priority evidence required to support delivery.

Whilst the sector supports the principle of the Programme Manager and contributing to ongoing work to progress the commitments in this document, this is subject to receiving further detail on potential cost implications before any funding commitments are made, recognising that these will not be known until the priorities of the next Welsh Government are confirmed.

Furthermore, community energy stakeholders have made a significant contribution to the development of the Sector Deal and have demonstrated a strong willingness to continue supporting its delivery, either as the Sector Lead for Theme 7 or through participation in Task & Finish Groups. However, it has been acknowledged that some organisations do

not have the financial resources to sustain this level of engagement over the anticipated four year duration of the Sector Deal. The incoming Welsh Government will therefore need to consider funding arrangements to enable these organisations to continue participating in implementation.

Welsh Government could hold the Sector Leads Group and Task & Finish Groups to account, supported operationally by the Programme Manager and overseen by the Cabinet Secretary. The implementation of the Sector Deal will begin following its publication under the current Welsh Government, with short term actions commencing immediately as they require time commitment rather than initial funding, with Local Partnerships potentially fulfilling the Programme Manager role.

The preferred longer term implementation option could be selected after the 2026 Senedd election, once the new administration is formed, with a decision expected following the nomination of the First Minister by the newly convened Senedd no later than 3 June 2026.

### Programme manager (applicable across all options)

Within the context already outlined earlier, many decisions will be for a new administration, the Programme Manager role could be central to ensuring delivery at pace for the anticipated four year duration of the Sector Deal, aligning implementation with the term of the next Welsh Government.

#### Key responsibilities would include:

- Maintaining the commitments tracker and overall delivery roadmap
- Coordinating meetings and workflows across the Sector Leads Group and Task & Finish Groups
- Preparing documentation, briefings, agendas and progress reports
- Maintaining transparent pooled-fund reporting

- Managing procurement and contract oversight for specialist workstreams
- Ensuring consistency across themes and supporting resolution of cross cutting issues (e.g., grid, skills, community benefits)
- Providing day to day coordination to maintain delivery momentum and support stakeholder engagement.

Until the technology specific prioritisation matrix of commitments is produced, it is difficult to calculate budget estimates for any additional studies or work packages that may be required, and these would also depend on the priorities of the next government. Similarly, the extent to which Programme Management support will be required cannot yet be confirmed. The estimated cost for full time programme management support is expected to be in the region of £40,000 to £50,000 per year.

### Meetings and reporting frequency

Task and Finish Groups could meet at least quarterly, with more frequent meetings during initial mobilisation. Annual progress reports could be published for transparency, and consideration of Ministerial attendance could be given to provide Welsh Government leadership.

### Change control mechanism

A formal change control mechanism will be developed during implementation, which will allow the Sector Deal to adapt to evolving policy, market and system conditions. Where a priority commitment encounters delay or a blocker that cannot be resolved within a Task and Finish Group, the issue will be escalated to the Sector Leads and, where necessary, to senior Welsh Government officials or Ministers to ensure timely decision-making and prevent stagnation on critical issues.

### Option 1 – Joint Welsh Government and developer funding

Welsh Government and developers with the greatest share of Wales's renewable project pipeline jointly contribute to a pooled implementation fund. This fund will be used to:

- Employ the Programme Manager for the full duration of the Sector Deal
- Commission priority technical studies and evidence identified within the commitments

As set out in Section 4, Sector Leads will be tasked with developing a practical, technology-specific prioritisation matrix to guide Task and Finish workstreams and sequence actions where they deliver the greatest value. All expenditure from pooled funds will be transparently reported through annual updates, detailing sources, allocations and outcomes. Any repurposing of pooled funds will require shared approval from contributing developers and Welsh Government.

Governance, meeting structures and reporting arrangements follow the model set out above. The Programme Manager delivers the full responsibilities listed in the Programme Manager section.

### Option 2 – Developer funded implementation

All governance, meeting structures, reporting arrangements and the Programme Manager functions mirror those described above. The difference is funding:

- Developers alone contribute to the pooled implementation fund covering the Programme Manager and agreed studies.
- Welsh Government continues to lead governance but does not contribute financially.

The Programme Manager carries out the same responsibilities outlined above, funded solely by developer contributions.

### Option 3 – Mixed funding model including wider stakeholders

This option retains the same governance framework and Programme Manager responsibilities as described above.

The difference is a diversified funding approach:

- Contributions may come from developers, Welsh Government (if Ministers choose), and wider stakeholders such as environmental NGOs, community organisations or public bodies, who will then become part of the Task and Finish Groups
- Funding may be project specific, allowing targeted commissioning where broader perspectives are valuable.
- Only contributors to a specific work package would influence prioritisation decisions for that work package.

## 10. Conclusion

Welsh Ministers are grateful to the Sector Leads and Task and Finish Group members who have contributed to, and reached agreement on, the Sector Deal. Their collective expertise and collaboration have been invaluable. It is felt that this work will provide a strong and well-evidenced foundation for the incoming Welsh Government.



# Annex 1 – Commitments

Theme	Owner	Commitment	Timescale
Theme 1: Enabling Environment – Policy, Regulation and Consenting	Welsh Government	A decision to revise Future Wales: The National Plan 2040 will be a decision for the next Welsh Government and would include a call for evidence.	Short
		Provide guidance to ensure stable, consistent policy frameworks across departments, developed collaboratively with stakeholders. It is intended to publish guidance on peat before the end of this Senedd.	Short and ongoing
		Explore mechanisms to enhance NRW’s advisory capacity, including consideration of a pre-approved external advisory panel funded by applicants, and a central resource to ensure timely scoping and consenting advice where NRW’s internal resources are limited.	Short and ongoing
		Monitor the effectiveness of the additional funding Welsh Government has provided to statutory bodies (NRW, PEDW, LPAs), and review whether further support may be required to ensure delivery is effective.	Short and ongoing
		Following publication and endorsement of the SSEP, explore the relationship between the SSEP and Future Wales: The National Plan, including clarification of status and alignment and the need to consider any technology-specific targets. This may include assessing whether an update to Future Wales is needed to reflect the SSEP.	Medium
		Monitor the effectiveness of the digital transformation for planning services, including the recent changes to the consenting platforms, including feedback from users.	Medium and ongoing
		Continue to work with the Crown Estate and NRW to strengthen the evidence base and clarify information gaps and consider future opportunities as part of national planning and marine policies future reviews.	Medium/ research will take longer
		Continue supporting the UK government renewable energy policies relating to radar safeguarding, consenting, constructing, environmental and network regulation, towards the delivery of clean power by 2030, where powers lie with UK government.	Medium/Long

Theme	Owner	Commitment	Timescale
	Sector	Share pipeline information with Welsh Government, providing the best available timelines to inform future resourcing of planning and consenting bodies.	Short and ongoing
		Sector to respond to future consultations, including calls for evidence, on themes such as those recognised in the Sector Deal and the PAAs, and to consider the current consultation on the Strategic Planning Guidance for the Gwent Levels.	Short/Medium
		Continue to engage at the scoping stage with relevant consenting bodies and communities, to sustain and ensure that good quality applications are submitted.	Short/Medium
	Shared	Work with relevant authorities to develop early engagement protocols on radar safeguarding and jointly identify practical and transparent solutions for NATS radar constraints to unlock onshore wind deployment. Work with NATS, the CAA and Cardiff Airport to develop a transparent radar safeguarding solutions and clarify aviation policy levers available to Welsh Government.	Medium
		Work collaboratively to co-develop consistent, clear and unambiguous policy and guidance, including early engagement prior to formalisation, to ensure it is practical, consistent and informed by sector experience.	Medium
		Develop collaborative ways of working to establish a mechanism for evidence sharing across projects and technologies, building a shared environmental evidence base and address critical data gaps.	Medium

Theme	Owner	Commitment	Timescale
Theme 2 – Market making – Investment and Funding Support	Welsh Government	Welsh Government will encourage the sector to access existing technology related funding packages from both Welsh and UK level sources, with information disseminated through guidance that sets out the identified public and private finance available.	Short and ongoing
		Advocate for GBE's involvement in early-stage project development and ensure clear routes for Welsh projects to engage with emerging GBE delivery streams. Establish a Strategic Partnership Agreement with the NWF to deliver priorities for Wales.	Short/Medium
		Welsh Government will advocate to DESNZ to ensure that parameters for future CfD Allocation Rounds are set appropriately to increase the likelihood of success for projects in Wales, including securing adequate budget allocation, to ensure a viable market for the Welsh supply chain. This will include providing input into the CIB scheme.	Short/Medium Dialogue needs to be ongoing
	Sector	Provide clear pipeline visibility in order to attract private investment and enable Welsh SMEs to prepare for opportunities from both a capability and readiness perspective.	Short and ongoing
		Share visibility on discussions and outcomes related to funding opportunities with organisations such as the NWF, GBE, the Crown Estate and the Offshore Wind Growth Partnership – Industrial Growth Fund (e.g. exploring the potential to jointly shape funding packages).	Short/Medium
		Coordinate advocacy for UK-level changes (CfD, grid investment) under a unified Welsh sector voice, to strengthen Welsh representation insofar as possible in UK policy and funding decisions.	CfD – Short/ Medium Grid – Medium
	Shared	Work with funding partners such as the Development Bank of Wales to combine public and private funding packages that support the sector's technological needs.	Short and ongoing
		Contribute to the DESNZ consultation on how a mandatory shared ownership offer could work.	Medium
		Explore opportunities for public-sector bodies to support community energy through procurement and partnership approaches, where compatible with procurement legislation.	Medium
		As part of wider local energy planning, explore opportunities for community participation in emerging local energy market models, including virtual market arrangements, and consider the implications for future policy development.	Medium

Theme	Owner	Commitment	Timescale
Theme 3 – Skills and Workforce	Welsh Government	Work with partners to ensure opportunities, such as access to careers information and training are available to people at all stages of their career are made available for those at all stages of their career – from those undertaking initial training to those transferring between industries, and those seeking to up-skill within their existing careers, recognising the importance of reskilling and career transition pathways.	Short/Medium
		Building on existing policy objectives, work with industry and other partners to develop roadmaps for apprenticeships and other qualifications, linked to anticipated deployment timelines.	Short/Medium
		Assess the universality of the approaches recommended by the skills sub-group (of the Offshore Wind Task and Finish Group), including applicability across technologies.	Short/Medium
		Work with Regional Skills Partnerships and Careers Wales to improve co-ordination and to clarify roles of other partners, including clearer articulation of delivery responsibilities across the skills system, including the exploration of how best to deliver initiatives such as centres of excellence for renewable energy in Wales.	Medium
	Sector	Share long-term project pipeline to inform skills development and planning.	Short and ongoing
		Commit to exploring ways to increase local recruitment, course development, and training partnerships with FE colleges and universities, where viable cohorts can be supported.	Short/Medium
		Develop recruitment principles/guidelines to help applicants and training partners prepare, including clearer information on entry requirements.	Short/Medium
	Shared	Inspire the next generation through voluntary hours for primary school engagement, supported by existing ambassador registers (for example STEM) and agreed annual voluntary time commitments.	Short and ongoing

Theme	Owner	Commitment	Timescale
		Co-ordinate approaches between the educational institutions (working in collaboration with MEDR – Commission for Tertiary Education and Research), colleges and Universities, Regional Skills Partnerships, Welsh Government and industry to ensure a nationally co-ordinated approach to skills across Wales to support the implementation of the Net Zero Skills Action Plan.	Medium
		Develop a 10–15 year workforce plan tied to technology deployment targets.	Medium
		Deliver a more co-ordinated approach to early STEM-engagement.	Medium
		Sector to work with Welsh Government and other partners to develop further understanding of the resources required for apprenticeships and other qualifications, including modular courses, bootcamps and other short courses (supporting the work of MEDR).	Medium
		Launch a live platform for skills opportunities (e.g. covering training, funding, jobs and work-experience opportunities), integrating the separate platforms that already exist.	Medium and ongoing

Theme	Owner	Commitment	Timescale
Theme 4 – Grid in Wales	Welsh Government	Consider and respond to the Independent Advisory Group report.	Short
		Continue to work with NESO and Ofgem to ensure Welsh priorities are reflected in the SSEP and Regional Energy Strategic Plan (RESP), including seeking alignment across Welsh local and regional energy plans and grid planning.	Medium
		Work with NGET to identify regulatory or process changes that could streamline the development and delivery of strategic grid projects.	Medium
		Provide clarity on consenting for grid infrastructure and policy application through collaboration and consultation with relevant stakeholders	Medium
		Lead a Wales-wide advocacy programme to secure additional grid capacity in Wales in line with the evidence from Future Grids for Wales, energy plans and the emerging RESP requirements.	Medium and ongoing
	Sector	Engage the wider industry in shaping grid investment priorities.	Medium
	Shared	Contribute to the SSEP and RESP to consider whether the capacity projections are appropriate, and whether these Plans will provide the evidence for a Welsh grid upgrade roadmap with clear capacity targets and timelines, feeding into post-2030 planning.	Medium
		Consider the implications of the Connections Reform process and for each technology sector to raise concerns with Welsh Government and the relevant bodies.	Medium
		Consider the implications of TNUoS charging impacts on Welsh projects to ensure fair treatment in UK grid investment decisions.	Medium
		Consider how to best to support community projects in relation to grid including examining mechanisms that could support timely connections for community-led schemes.	Medium
		Explore options for assessing community-scale grid-balancing potential at primary-substation level, to inform future evidence-based policy development relating to community and local ownership.	Medium

Theme	Owner	Commitment	Timescale
Theme 5 – Innovation and Research (including post operation)	Welsh Government	Build on the Innovate UK and Welsh Government Collaboration Plan to strengthen alignment with Welsh needs and opportunities.	Medium
		Consider future policy opportunities when national (land) planning and marine planning policies are reviewed.	Medium
	Sector	Share best practice on recyclable components and decommissioning and repowering strategies.	Medium
		Improve transparency on global material sourcing and labour practices, where feasible and proportionate.	Medium
	Shared	Use the Wales Innovates strategy and its accompanying delivery plan to identify priority areas for joint R&D investment in the sector, building on existing Welsh and UK research strengths.	Short and ongoing
		Work with Welsh academia and businesses in the sector to develop and maximise the commercial potential of research outputs.	Short/Medium
		Use our Partnership Agreement, Memorandum of Understanding and Data Sharing Agreement with Innovate UK to improve visibility and reduce duplication in the sector.	Short/Medium

Theme	Owner	Commitment	Timescale
Theme 6 – Infrastructure and Supply Chains	Welsh Government	Business Wales to evolve a national and UK wide supply chain portal to simplify SME engagement and avoid multiple project-specific systems (linking with Sell2Wales), building on existing platforms rather than creating new duplicative systems.	Medium
		Support the need for investment in port infrastructure including targeted investment for tidal deployment, as well as offshore and future usage for other technologies, recognising the need for flexibility as technology requirements evolve.	Medium/Long
	Sector	Organise meet-the-buyer events and regional supply chain mapping, working with Business Wales, Corporate Joint Committees, regional Welsh Government offices, local authorities, CBI Cymru and other relevant partners.	Short/Medium
	Shared	Develop MoUs with project developers as required, ensuring that all MoUs include clearly defined criteria and use standard templates to maximise opportunities for Wales.	Short/Medium to develop template
		Identify and co-ordinate funding for Welsh SME supply chains, drawing on models used by the Crown Estate and the Offshore Wind Growth Partnership where appropriate, and tailor support to Welsh market conditions.	Medium
		Align skills and supply chain strategies to maximise local economic benefit, linked to combined events.	Medium
		Work collaboratively to promote fair work practices, including the adoption of the Living Wage, across renewable energy projects and supply chains in Wales.	Medium

Theme	Owner	Commitment	Timescale
Theme 7 – Community Ownership and Benefits	Welsh Government	Respond to the outcome of the UK Government’s Community Benefits and Shared Ownership for Low Carbon Energy Infrastructure consultation, with the sectors providing Welsh Government with the evidence base on which to respond.	Short/Medium
		Continue supporting local projects through existing services such as the Welsh Government Energy Service and Ynni Cymru.	Short/Medium
		Review and update Local Ownership Guidance in collaboration with the sector and set clear frameworks for benefit sharing across technologies, recognising differences between technologies and project scales.	Medium
		Consider options to integrate energy affordability into community-benefit design with the aim of helping communities cut bills and keep more value locally.	Medium
		As part of wider regulatory and funding reforms, coordinate advocacy with the UK Government, NESO and the Distribution Network Operators to advocate for community energy considerations to be reflected in future grid connection reforms, including exploring how ready community projects could be recognised within emerging first ready and needed queue management frameworks.	Medium and ongoing
	Sector	Commit to working with UK and Welsh Governments and other relevant stakeholders, with the aim of offering community benefits and shared ownership as standard.	Short and ongoing
		Support development of communications toolkits for community engagement.	Medium

Theme	Owner	Commitment	Timescale
	Shared	Review the definitions of community and local ownership, assess the social-value outcomes associated with each, and explore options for setting separate targets for community and local ownership.	Short/Medium
		Create a register of existing community benefits across Wales and provide evidence as part of DESNZ's call for action on whether current approaches are delivering positive outcomes for communities.	Short/Medium
		Establish a current national public register of all renewable developments and shared ownership opportunities.	Short/Medium
		Develop a standardised community benefit framework for Wales, considering the outcomes of the DESNZ consultation.	Medium
		Coordinate with the Well-being of Future Generations Commissioner to embed social value principles, within the implementation of the Sector Deal.	Medium
		Consider how best to support community groups on topics such as planning engagement, shared ownership engagement and development, capacity building for community benefit arrangements, and navigating Development Consent Order and significant planning processes.	Medium
		Explore options for supporting the development of the DESNZ "Community Energy in a Box" toolkit and associated shared ownership templates for communities.	Medium
		Explore opportunities for community participation in repowering projects, including potential pathways that could support community involvement or ownership at the point of repowering.	Medium
		Collaborate with GBE and DESNZ to contribute Welsh evidence on how current market arrangements affect community projects across different regions, and use this to inform UK policy options, including the assessment of proportionate support mechanisms for community projects where the evidence shows they are justified.	Medium and ongoing

# Glossary of Key Terms

CAA – Civil Aviation Authority

CIB – Clean Industry Bonus

CSNP – Centralised Strategic Network Plan

CfD – Contracts for Difference

DBW – Development Bank of Wales

DESNZ – Department for Energy Security and Net Zero

DNO – Distribution Network Operator

DCO – Development Consent Order

GBE – Great British Energy

KTP – Knowledge Transfer Partnership

LPA – Local Planning Authority

MEDR – Commission for Tertiary Education and Research (CTER) / Medr

NATS – National Air Traffic Services

NWF – National Wealth Fund

NESO – National Energy System Operator

NRW – Natural Resources Wales

OFGEM – Office of Gas and Electricity Markets

OWGP – Offshore Wind Growth Partnership

PEDW – Planning and Environment Decisions Wales

PV – Photovoltaic

SSEP – Strategic Spatial Energy Plan

STEM – Science, Technology, Engineering, and Mathematics

tRESP – Transitional Regional Energy Strategic Plan

TNUoS – Transmission Network Use of System (charges)

UKRI – UK Research and Innovation

# Appendix 1: Terms of Reference for the Renewable Energy Sector Deal Task and Finish Group

We have a vision for renewable energy that leads to energy security and creates green jobs for current and future generations in Wales. The Renewable Energy Sector Deal Task and Finish Group will advise the Cabinet Secretary for Economy, Energy and Planning on actions which will help to sustain the positive environment for renewable energy in Wales while protecting and promoting the environment and interests of communities. The group will:

- Provide a detailed and honest assessment of the deliverability of renewable energy across technologies and identify the priority areas to secure economic and social change across our communities and wider economy, and
- Agree the contents of the Renewable Energy Sector Deal
- Develop for inclusion in the Renewable Energy Sector Deal clear recommendations with concrete actions, timescales and action owners to maximise the opportunities for Wales from renewable energy.

The group will be led by technology leads (sector leads) responsible for working within their technology. Members are expected to engage with representations from across their industry to report back to the task and finish group.

Key areas the task and finish group will need to address/consider in the development of the action plan will be:

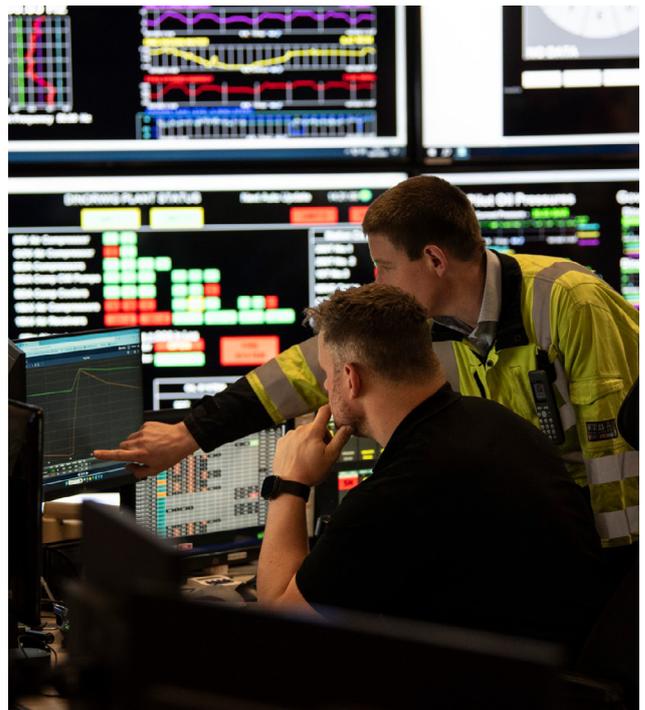
- The existing actions taken and investments made in recent months and years in key areas in order to focus the sector deal on unblocking remaining barriers.
- The Offshore Wind Task and Finish Group recommendations may include actions which will be relevant to other renewable energy technologies. Similarly, the UK Government's Solar Roadmap and Onshore Wind Strategy include some recommendations which are to be taken forward with the Devolved Government's.

The work of the UK Government on the Marine Taskforce will also need to be considered as discussions progress alongside this document. Those actions may be relevant to the work of this Group. The sector leads are to be responsible for bringing the relevant actions forward for consideration.

- Developer requirements, particularly in relation to consenting, supply chain and skills.

The Task and Finish Group will provide high level recommendations by 1 December 2025 and conclude by March 2026.

Due to the commercial sensitivities of material to be discussed within the group we will not publish minutes from the group. Members will respect the confidential nature of any discussions. We only intend to publish the action plan outputs. Any other published outputs from the group will be agreed with all members of the group.



### **Membership**

The membership of the Task and Finish group is set out below. We will only accept deputies if agreed in advance with the secretariate team.

Members will have been chosen based on their capacity to disseminate output from the meetings within their respective technology sectors and to likewise bring the views and experiences of that sector to the discussions. Feedback from the relevant technology sectors on topics will form an important part of the discussion at each of the meetings.

RWE, Lightsource BP, Cenin, EDF, Statkraft, Trydan Gwyrdd, Bute, Galileo, Wind2, Coriolis, Inyanga, QED Naval, British Hydro, Morlais, BSR, Coalfields Regeneration Trust, Wales Council for Voluntary Action, ENSO

### **Task and Finish group coordinator and Chair:**

Local Partnerships

### **Renewable Industry body Industry Contributors:**

Solar Energy UK, Community Energy Wales, RenewableUK Cymru, Marine Energy Wales

### **Administration**

The Task and Finish group will be supported by officials from across government including, energy and economy divisions.

The group and/or its sub groups will aim to meet every two weeks through a combination of face to face and teams meetings.

